



HAL
open science

Harnessing Online Research Communities for Co-creation in Social Marketing

Agnès Helme-Guizon

► **To cite this version:**

Agnès Helme-Guizon. Harnessing Online Research Communities for Co-creation in Social Marketing. Social Marketing Quarterly, In press, 10.1177/15245004241264052 . hal-04615939

HAL Id: hal-04615939

<https://hal.science/hal-04615939>

Submitted on 18 Jun 2024

HAL is a multi-disciplinary open access archive for the deposit and dissemination of scientific research documents, whether they are published or not. The documents may come from teaching and research institutions in France or abroad, or from public or private research centers.

L'archive ouverte pluridisciplinaire **HAL**, est destinée au dépôt et à la diffusion de documents scientifiques de niveau recherche, publiés ou non, émanant des établissements d'enseignement et de recherche français ou étrangers, des laboratoires publics ou privés.

Harnessing Online Research Communities for Co-Creation in Social Marketing

Agnès HELME-GUIZON

Univ. Grenoble Alpes, Grenoble INP*, CERAG, 38000 Grenoble France

What distinguishes social marketing from similar approaches is its unique practice of co-creating solutions and strategies with stakeholders (Deshpande, 2019). Within the realm of participatory design, numerous human-focused design methods, such as co-design and design thinking, have been developed and evaluated in diverse social marketing settings (e.g., Lefebvre & Kotler, 2011; Sherring, 2021; Trischler et al., 2019; Willmott et al., 2022). The practice of co-creation involves assembling individuals and assigning them to collaborative tasks during one or more workshops, where a facilitator guides the interaction between the participants, thereby facilitating the emergence of new ideas or solutions that are more adapted to the needs of the audiences and more effective in promoting positive changes for the individual, society, and the planet (Willmott et al., 2022). They are also more likely to be adopted and integrated into daily routines by individuals and implemented by other stakeholders (Trischler et al., 2019).

Co-creation sessions are usually in person, with online co-design less frequent. While the benefits of co-creation are well documented, the potential of online co-creation for marketing and social marketing, in particular, is vast and remains underexplored (Malinen, 2015). However, key factors in online co-creation are poorly understood.

I address the question of online co-creation through the lens of research communities — “a group of people who have been provided with an online environment in which to interact with each other (and the client and researcher) about topics related to a research interest.” (Comley, 2008, p.680). Research communities composed of individuals brought together for shorter or longer periods can yield rich and sometimes unexpected insights and facilitate collective goal achievement (Comley, 2008). Online research communities (ORCs) are increasingly perceived as valuable tools, primarily by practitioners and, to a lesser extent, by academics. In this commentary, I emphasize the value of ORCs as a critical component in constructing a social marketing program and examine the challenges involved in establishing and facilitating an ORC, focusing on the co-creation phase. I conclude by discussing the necessary precautions to mitigate the limitations of this approach.

Online research communities

Online research communities are primarily used to obtain qualitative insights, although quantitative surveys and polls can be conducted. They serve various purposes, including the co-creation of innovative solutions. They can last from one day to several months or even years, allowing for longitudinal data collection. ORCs are closed (participants need to register and be approved). Members may be selected based on specified profiles to ensure a variety of perspectives.

Online research communities are easy to use and convenient (usability), and they facilitate fluid interaction between participants (sociability). Usability refers to creating interfaces that are consistent, controllable, and predictable with the ultimate goal of making them user-friendly and enjoyable (Lazar & Preece, 2002). The primary features of a community with high usability are discussion, social support, design, navigation, and accessibility. The focus

of sociability lies in the planning and development of social policies, while simultaneously fostering social interaction. Its fundamental components include the community's purpose, people, and policies that help guide online behavior (Preece & Maloney-Krichmar, 2003). The purpose of the community must be clear and understandable so that participants can make an informed consent. Ideally, this should be reflected in the community name and logo. The community must be centered on participants' needs, motivation, background, personality, and socio-demographic characteristics (Füller, 2010), and its components must be adapted accordingly. Policies must be defined and communicated to the participants at earlier stages of the communities in order to regulate exchanges. However, they must be robust enough to direct community conduct while accommodating modifications as the community evolves (Preece & Maloney-Krichmar, 2003). In my professional experience, I found that recommendations frequently suggested in research communities can be valuable online.

Co-creation in a social marketing context

Following Sanders and Stappers (2008), co-creation was defined in a social marketing context as involving a collaborative design process that brings together researchers, practitioners, and consumers to develop innovative solutions *with* them rather than *for* them (Dietrich et al., 2016). Moving away from traditional expert-driven or top-down approaches, it enables stakeholders to be major players in solutions designed to foster change in their social or pro-social behavior. Participants can voice their personal experiences, emotions, insights, and perspectives, fostering individual and collective dynamics through collaborative storytelling and reciprocal support. As part of this process, participants are required to utilize their creative abilities and problem-solving skills and voluntarily contribute their resources. Co-creation has become essential to social marketing over the last ten years (Dietrich et al., 2022); for example, to develop a campaign to reduce household food waste, co-design a weight management program, build an alcohol program for parents (Trischler et al., 2019), create an advocacy program to assist behavior change in overseas visitors (Sherring, 2021) or customized solutions for healthier eating among European customers (Snuggs et al., 2023).

Co-creation in online research communities

OCRs bring together geographically dispersed people in the same place, enabling them to interact whenever they want, minimizing attrition, and maximizing participation and time for personal thoughts. An OCR with high sociability (Lazar & Preece, 2002) promotes a lively and engaging qualitative and quantitative exchange of interactions, thereby facilitating a successful co-creation process. Moreover, it offers researchers and practitioners great flexibility; they can pursue many different objectives and adapt them as the community evolves. In addition, they can use a multiplicity of tools (e.g., walls of images, positioning maps) and inputs (text, images, videos, gamified tools) to facilitate participants' narrative sharing and co-creative solution elaboration. They can navigate between private questions and group discussions depending on the questions and objectives. They can even organize collective tasks such as creating posters or prototypes. In a word, OCRs combine some interactive advantages of focus groups with face-to-face interviews.

Challenges raised by online research communities for co-creation in social marketing

Challenge 1: Choosing the Digital Platform

Three selection criteria can be derived from the Comley (2007) four-stage model. First, the digital platform needs to be accessible, that is, easy to log in, create an account, and post first contributions; in other words, it must have good usability (Lazar & Preece, 2002). Second, the platform must promote a social presence. Features such as photos and personal profiles of participants, message boards, and information about their involvement in various activities

add to the value of participant interaction (Füller, 2010). In addition, disclosure of personal elements relevant to ongoing research through photos or video posts is valuable for building relationships and a community. Third, the digital platform should facilitate dialogue and discussion with the facilitator and between the participants on various topics, moving from simple opinion and behavior-based questions to more complex or sensitive discussions and on a variety of formats, from one-to-one discussions to collective activities. The platform, referring to its sociability component (Lazar & Preece, 2002), should provide a multimedia-rich but simple-to-explore environment likely to “contribute to a better understanding [of the researched issue], inspire consumers to come up with creative ideas, or reduce their cognitive effort to articulate and build a solution” (Füller, 2010, p.116).

Challenge 2: Recruiting and Initiating Participation

Recruiting participants poses challenges at least at four levels: 1) the cause may be sensitive (e.g. violence, alcohol, drugs), 2) targeted audiences may not be willing to change their behavior or participate in co-creating solutions (Trischler et al., 2019), 3) they may not be listed or identified by local stakeholders or 4) they may reside in geographically extensive or dispersed habitats (which is where online communities have an advantage). In such cases, traditional recruitment methods employed at events or locations like supermarkets, community centers, or associations may prove insufficient. Alternative methods such as social media (Facebook, LinkedIn or Twitter) (Trischler et al., 2019), or panels (MTurk, Prolific, and Qualtrics) (Snuggs et al., 2023) may be beneficial. The invitation messages' tone and approach should be carefully considered to achieve the right balance between brevity and readability while effectively conveying the concept of community and associated commitment (Comley, 2008). To ensure long-term engagement, it is essential to gauge participants' interest in co-creating solutions for social or environmental change and their writing skills before enrolling them. A screening questionnaire with a writing task of approximately ten lines can be valuable. This effort serves as an acceptable proxy for long-term commitment to the ORC and participation in co-creation tasks (Gurviez et al., 2022).

Recruitment and participation can be facilitated by incentives viewed by the participants as a reward. Most previous studies recommend monetary incentives not be distributed as they are deleterious to intrinsic motivation, which is the motivation to support sincere and lasting engagement in an online community (Comley, 2008; Füller, 2010). Instead, they suggest non-monetary incentives such as direct and honest feedback, a warm thank-you, or an official naming as a co-developer that encourages participation, recognizes contributions and boosts self-esteem. In addition, participating in a social marketing co-creation process and the experience of the online community itself such as high-quality interactions, pleasant encounters with others, social amenities, enjoyment derived from contribution to activities can be viewed as a reward. Certain participants may prioritize addressing issues that hold personal significance for them, such as devising health-or environment-related solutions, over receiving monetary compensation. However, for participants driven by extrinsic motivation, financial compensation according to the effort made, such as special offers, vouchers, or prizes are needed. Incentive (monetary vs. non-monetary) effectiveness is intimately linked to participants' motivation (intrinsic vs. extrinsic) (Füller, 2010). As motivation is difficult to gauge at the recruitment stage and may evolve over time, it is recommended to incorporate a combination of monetary and non-monetary incentives throughout the community's lifecycle.

Once participants have accepted to participate in the research and have signed a consent form and a charter of good conduct, there comes the moment of truth: initiating participation. As mentioned above, it depends on the usability features of the platform, as well as the ability of

the facilitator to engage participants. As people tend to contribute more when they are aware of the identity of the person they are interacting with (Comley, 2008), it is of the utmost importance for the facilitator to introduce themselves (in the same way as participants are asked to do) in addition to describing the purpose of the community.

Challenge 3: Crafting the Co-Creation Journey

The third challenge is to craft the co-creation journey within the online research community. To maximize co-creation outcomes, developing a comprehensive guide outlining each stage of the co-creation process is necessary. Human-centered design methods provide valuable directions. For example, the journey can be structured around the three phases of design thinking: Inspiration, Ideation, and Implementation (IDEO, 2024). During the inspiration phase, which corresponds to the launch of the ORC and its building, the questions/tasks should revolve around self-presentation and representations, motivations, and barriers associated with the topic that will be addressed in the community (e.g., reducing food waste of fresh produce, promoting waste recycling at work, and reducing sedentary behavior among the elderly). Participants may be requested to provide narratives pertaining to the subject matter along with the submission of images or videos. The anticipated outcomes include enhanced familiarity with and among the participants, mutual trust, and the inclination to collaborate and share with others with a common interest in the topic. The ideation phase corresponds to generating ideas (divergence phase) and selecting the best or preferred ideas (convergence phase). It can be based on a set of toolkits developed by researchers and practitioners. During the implementation phase, participants have to collectively elaborate upon one or more co-created solutions to deliver a prototype (Snuggs et al., 2023; Trischler et al., 2019).

Challenge 4: Engaging and Facilitating Interactive Participation

The fourth challenge is to engage and facilitate participation. This task falls on the facilitator. Through prompts, reminders to participate, encouragement, sincere and constructive feedback, and recognition of the quality of the contribution, the facilitator can promote active engagement and stimulate the creative potential of participants. Their role is to pick up on who is not commenting and ensure they are not getting lost (Comley, 2008). They must also inform or remind participants of the co-creation process (this can be done by sending daily emails announcing the activities of the day and any challenges) and clarify the rules if necessary. The content of their posts should explicitly encourage reflection, summarize exchanges, and, if necessary, reorient discussions toward the co-creation task at hand. The proposed co-creation activities must be engaging, interesting, relevant and fun to maintain participants' engagement over the long term. An effective facilitator's capacity to establish a thriving community is demonstrated by participants' willingness to consult, comment, and build upon one another's contributions, thereby fostering a dynamic and collaborative co-creation process (Füller, 2010). The key to success lies in encouraging participants to engage in dialogue with both the facilitator and their peers (Comley, 2008).

Engaging in co-creation and experiencing satisfaction reinforce intrinsic motivation. However, it may be useful, especially for reward-oriented participants, to provide additional financial incentives or awards to top performers, considering the quality and quantity of their contributions. This approach ensures that the most valuable participants are recognized and rewarded while discouraging free riding (Füller, 2010). The facilitator plays a crucial role in the success of a co-creation ORC, thanks to his or her almost constant presence and proficiency.

Challenge 5: Nurturing Co-Creation Online

The fifth challenge is to foster creative co-creation within the ORC. Human-centered design methods (Biroscak et al., 2018; IDEO, 2014; Trischler et al., 2019) can be implemented online, with some adjustments to fit the digital context. Powerful tools are essential (von Hippel & Katz, 2002) to enable participants to convey their ideas more easily and effectively with minimum effort and to take idea generation further than free elicitation. Snuggs et al. (2023) described how tools such as photo sharing, word associations adapted from Kent and Rosanoff (1910), brainstorming, and prototyping according to design thinking principles were successfully implemented in an ORC for food and physical activity-related co-created solutions.

Challenge 6: Creating a Unique Experience

The sixth challenge is creating a unique experience for the participants, “a compelling, flowing, engaging, supportive, and interactive experience” (Fuller, 2010, p.119) to maintain a high level of intrinsic motivation. The elements discussed previously—usability, sociability, co-creation activities, interactivity, and the facilitator's unique presence, if skillfully mastered and orchestrated—contribute to this unique experience. Moreover, participants must find renewed pleasure in participating in an online community over time. Surprising them with challenges, activities, and rewards can contribute to this. Online co-creation experiences are not contingent upon technology or facilitators; instead, they should be transparent and seamless, blending into the background of the experience. This invisibility is not a result of their nonexistence but rather their seamless integration into the flow of the experience.

Challenge 7: Evaluating the Co-Creation Process in ORC

The seventh and last challenge refers to evaluation, a key element of the social marketing approach (Dietrich et al., 2022). It concerns both the co-creation process and its results. Evaluation can take a quantitative approach, which involves counting the number of participants recruited, enrolled, and who actively/moderately/slightly participated, as well as the number of posts, generated ideas, co-designed solutions, and prototypes created. Additionally, it can involve questionnaires to assess satisfaction, enjoyment, well-being, self-esteem, perceived expertise, empowerment, commitment to the wicked problem, and the intention to talk about it, find out more, or change one's behavior. Evaluation can also take a qualitative approach, which involves observations made by social marketers through their field notes on the progress of the online community. This can also include questions through the online community or focus groups, and individual interviews following the ORC to assess the participants' experiences. Roederer's (2012) four-dimensional model – praxeological, hedonic-sensory, rhetorical, and time-related – can be useful in describing participants' experiences. The praxeological aspect of the experience pertains to the connections between participants and other participants as well as with the facilitator. The hedonic-sensory dimension refers to pleasurable elements closely linked to sharing with others and, conversely, to elements that are unpleasurable and related to the regret of not having more direct interactions with other members. The rhetorical dimension refers to the meaning of an experience.

Discussion

In this commentary, I discuss the potential of online research communities for co-creation in social marketing. The challenges associated with this endeavor are identified and discussed in light of the literature, personal experience, and insights from colleagues and co-authors. I pinpoint seven challenges and propose solutions to overcome them to ensure that co-creation in online communities yields valuable insights, innovative solutions, increased engagement with complex problems, and a sense of empowerment among participants. By engaging in this

process, individuals can acquire valuable knowledge, enjoy the experience, and gain a deeper understanding of their practices, which could potentially lead to future changes.

Despite the outlined benefits of online communities for co-creation, limitations for both participants and online facilitation must be acknowledged. First, participants' technological proficiency can hinder their co-creation experience, leading to less fluid outcomes and impacting the solutions generated. Second, individual characteristics must be considered in community facilitation: participants' motivation, creativity, and sensitivity to certain types of incentives (monetary vs. non-monetary) may influence their decision to participate in the proposed activities (Füller, 2010). It is unrealistic to believe that every participant can be involved in all activities. It is better to focus on improving the quality of participation. This includes creating a sense of purpose for the participants thereby supporting their intrinsic motivation (Malinen, 2015). When it comes to facilitation, it is important to bear in mind that social marketing researchers and practitioners organize communication on a precise and actively moderated topic. As a result, there is a risk that participants will answer the questions, neglecting interactions with other participants. To mitigate this tendency, it may be helpful to propose sequences of collective activities that connect content from various participants and emphasize similarities and differences. A free discussion forum can encourage participants to engage with one another rather than solely focusing on the facilitator. The role of the facilitator is crucial in an ORC, probably more so than in a traditional face-to-face context. However, facilitators may sometimes struggle to balance the research objective with creating an engaging experience for participants, particularly when off-topic themes are involved (Malinen, 2015).

The advantages of incorporating a variety of activities and tools in online communities for co-creation, despite their limitations, should be weighed against the relatively lower cost of facilitating an online research community as compared to face-to-face methods. Social marketing researchers and practitioners can efficiently and cost-effectively integrate online communities for co-creation into their program development process.

Acknowledgements

I extend my heartfelt appreciation to all those - participants, students, and co-authors - who have enabled me to shape my experience and build knowledge on online research communities and co-creation. Additionally, I would like to express my gratitude to the editors for their diligent and perceptive review, which has greatly improved the quality of this commentary.

References

- Biroscak, B. J., Schneider, T., Martinez Tyson, D., Aguado Loi, C. X., & Bryant, C. A. (2018). Applying tools from human-centered design to social marketing planning. *Social Marketing Quarterly*, 24(2), 63–73. <https://doi.org/10.1177/1524500418761624>
- Comley, P. (2007). Online panels are unsustainable: Online communities are the future – BBC World Service Case Study. *Proceedings of the ESOMAR Panel Research Annual Conference*, Orlando, 24–26 October, 199–211.
- Comley, P. (2008). Online research communities-a user guide. *International Journal of Market Research*, 50(5), 679-694. <https://doi.org/10.2501/S1470785308200092>

- Deshpande, S. (2019). Social marketing's strengths, weaknesses, opportunities, and threats (SWOT): A commentary. *Social Marketing Quarterly*, 25(4), 231-242. <https://doi.org/10.1177/1524500419881770>
- Dietrich, T., Hurley, E., Carins, J., Kassirer, J., Rundle-Thiele, S., Palmatier, R. W., ... & Lee, N. (2022). 50 years of social marketing: seeding solutions for the future. *European Journal of Marketing*, 56(5), 1434-1463. <https://doi.org/10.1108/EJM-06-2021-0447>
- Dietrich, T., Rundle-Thiele, S., Schuster, L., & Connor, J. (2016). Co-designing social marketing programs. *Journal of Social Marketing*, 6(1), 41-61.
- Füller, J. (2010). Refining virtual co-creation from a consumer perspective. *California Management Review*, 52(2), 98-122. <https://doi.org/10.1525/cm.2010.52.2.98>
- Gurviez P., Helme-Guizon A., Mourre M.-L. & Raffin S. (2022), Leveraging co-creation to engage in sustainable behavioural changes: A French touch of Social Marketing, Special session, 5th Social Marketing Conference, ESMA, Thessalonica (Greece).
- IDEO.ORG. (2024). The Field Guide to Human-Centered Design. A step-by-step guide that will get you solving problems like a designer. <http://www.designkit.org/resources/1.html>, accessed March 21st.
- Kent, G. H., & Rosanoff, A. J. (1910). A study of association in insanity. *American Journal of Psychiatry*, 67(1), 37-96.
- Lazar, J. & Preece, J. (2002). *Social Considerations in Online Communities: Usability, Sociability, and Success Factors*. In H. van Oostendorp, Cognition in the Digital World. Lawrence Erlbaum Associates Inc. Publishers. Mahwah: NJ.
- Lefebvre, R. C., & Kotler, P. (2011). Design thinking, demarketing and behavioral economics: Fostering interdisciplinary growth in social marketing. *The Sage handbook of social marketing*, 80-94.
- Malinen, S. (2015). Understanding user participation in online communities: A systematic literature review of empirical studies. *Computers in human behavior*, 46, 228-238. <https://doi.org/10.1016/j.chb.2015.01.004>
- Preece, J., & Maloney-Krichmar, D. (2003). *Online Communities*. In J. Jacko and A. Sears, A. (Eds.) Handbook of Human-Computer Interaction, Lawrence Erlbaum Associates Inc. Publishers. Mahwah: NJ. 596-620.
- Roederer, C. (2012). A contribution to conceptualizing the consumption experience: Emergence of the dimensions of an experience through life narratives. *Recherche et Applications en Marketing (English Edition)*, 27(3), 81-95. <https://doi.org/10.1177/205157071202700304>
- Sanders, E. & Stappers, P. (2008). Co-creation and the new landscapes of design, *CoDesign*, 4(1), 5-18. <https://doi.org/10.1080/15710880701875068>
- Sherring, P. (2021). Using Co-Design to create community advocacy for biosecurity behavior change. *Social Marketing Quarterly*, 27(2), 67-81. <https://doi.org/10.1177/15245004211003111>
- Snuggs, S., Clot, S., Lamport, D., Sah, A., Forrest, J., Helme-Guizon, A., Kaur, A., Iqbal, Z., Caldara, C., Wilhelm, M.-C., Anin, C. & Vogt, J. (2023). A mixed-methods approach to understanding barriers and facilitators to healthy eating and exercise from five European countries: Combining consumer science, behavioural economics, and psychology, *Psychology & Health*, <https://doi.org/10.1080/08870446.2023.2274045>

Trischler, J., Dietrich, T., & Rundle-Thiele, S. (2019). Co-design: from expert to user-driven ideas in public service design. *Public Management Review*, 21(11), 1595-1619. <https://doi.org/10.1080/14719037.2019.1619810>

Willmott, T.J., Hurley, E. and Rundle-Thiele, S. (2022). Designing energy solutions: a comparison of two participatory design approaches for service innovation”, *Journal of Service Theory and Practice*, 32(3), 353-377, <https://doi.org/10.1108/JSTP-03-2021-0040>